

Annual Report to the Suffolk County Planning Commission

February 2008



Suffolk County Department of Planning
Suffolk County ■ New York

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to the
Suffolk County Planning Commission
February 6, 2008**

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Hauppauge, New York
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Section A 14-6 of the County Administrative Code requires the preparation of an annual report that shall include a summary of the activities of the Commission as well as a survey of the conditions of the county including population density, housing, conservation, employment and industrial conditions, water resources and transportation. This report is in accordance with the requirement and also includes a summary of the accomplishments of the Department of Planning for 2007 along with our goals for 2008.

Many significant projects were advanced during the year along with the ongoing administration of mandated functions including municipal zoning referrals, CEQ project reviews, open space and farmland preservation planning, demographic and economic data analysis and cartographic and GIS services. The volume and quality of work completed is directly attributable to the professionalism and dedication of the staff of the Department of Planning.

Thomas A. Isles, Director
Suffolk County Department of Planning

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INTRODUCTION

The Suffolk County Planning Commission is the leading planning entity at the county level. It has numerous duties, including the review of certain municipal zoning and subdivision actions, the preparation of plans and reports for the County Executive and the Legislature and the review of local comprehensive plans. The Commission may also authorize the Department of Planning to provide planning services to municipalities in the county that request such services.

The Commission consists of fifteen members that are appointed by the County Executive and are subject to confirmation by the Legislature. The Commission includes representation from the ten towns of the county, two representatives of incorporated villages and three members serving at-large. The Commissioners serve without compensation.

The Suffolk County Department of Planning provides administrative and staff support to the Commission. This includes the active involvement of professional planners as well as specialists in various fields, including environmental scientists, demographers, cartographers and technical and clerical staff. Projects undertaken by the department include accomplishments in the areas of

- County-wide Planning and Inter-municipal Coordination,
- Protecting Natural Resources and the Environment,
- Protecting Marine and Coastal Environments,
- Preserving Farmland and the Agricultural Economy,
- Professional Assistance to Local Government,
- Research and Data Collection - Analysis and Mapping,
- Special Projects, and
- Professional Planning Services to Boards and Agencies.

DEMOGRAPHIC, ECONOMIC, AND DEVELOPMENT TRENDS

The first European settlers arrived in Suffolk County in 1640 and the County was incorporated in 1683 as one of the ten original counties in New York State. Suffolk is a suburban county located on Long Island east of New York City and is bordered on the west by Nassau County. Suffolk County's land area totals 911 square miles, and the County is 86 miles long and 15 miles wide. With shores on both the Atlantic Ocean and the Long Island Sound, Suffolk County's shoreline totals 986 miles.

QUALITY OF LIFE

In 2004, Nassau-Suffolk was rated the third least stressful metropolitan area in the country (of the 100 largest areas), based on nine factors including the divorce and suicide rates, violent and property crime, and unemployment rate. However, in 2004 Nassau-Suffolk ranked 151 of 162 metropolitan areas in the affordability of its housing.

Also in 2004, *Forbes* magazine ranked 150 metropolitan areas according to various quality of life issues. In its 'Best Places for Business' report, the magazine ranked Long Island seventh highest in cost of living, but best in crime rate, 8th best in culture & leisure, and 39th best overall.

POPULATION

Total Population

Suffolk County's population continues to grow. The Long Island Power Authority (LIPA) estimated that Suffolk County had a population of 1,495,697 persons in 2006, a 5.4% increase over the 2000 census figure of 1,419,369. The increase between 1990 and 2000 was 97,505 or

7.4%. Between the U. S. censuses of 1980 and 1990, Suffolk's population had increased more slowly, by 36,000 or 2.9%. Based on 2003 data, among 3,141 counties in the United States, Suffolk County ranks 23rd highest in population. The County also has a larger population than 12 U. S. states.

In 1790, the first U. S. Census showed that Suffolk County had more people than Brooklyn, Queens, the Bronx and Staten Island combined. By 1915, Nassau County surpassed Suffolk County in population. But in 1986 Suffolk passed Nassau in population, becoming the most populated suburban county in the United States.

Suffolk County epitomizes the post-World War II suburb, as most of its population growth occurred in just 20 years from 1950 to 1970. During that time, Suffolk's population quadrupled, increasing by 851,000. Today its population growth is much slower. Yet despite overall stability in the total population figures, changes have been taking place in certain segments of the population.

Population Density

Based on 2006 Long Island Power Authority (LIPA) population estimates, Suffolk County's population density was 1,642 persons per square mile. Yet Suffolk's ten towns vary greatly in population size and density. The five western towns, Huntington, Babylon, Smithtown, Islip, and Brookhaven, contain 91% of the County's population but just 62% of its land area. The 2006 population density in western Suffolk was 2,402 persons per square mile, while in eastern Suffolk the density was just 400 persons per square mile. Of the ten towns that comprise the County, the largest in population is Brookhaven at 485,000 and the smallest is Shelter Island with 2,500 residents in 2006.

Although Suffolk has more people than Nassau County, Suffolk is only about one-third as densely populated as Nassau. Population density in Suffolk County (1,642 persons per square mile) is lower than the density in Nassau County (4,710 persons per square mile), Westchester County (2,166), Rockland County (1,675), Queens County (20,485), and Manhattan (67,372).

Population Projections

Suffolk County's population is projected to continue to increase moderately for the next two decades. Between 2004 and 2030, the County's population is projected to increase by 19%. Of Suffolk's ten towns, the Town of Riverhead is expected to increase by the largest percentage between 2004 and 2030, followed in order by the Towns of Southampton, Southold, East Hampton, Shelter Island and Brookhaven. The largest numerical increase is expected in the Town of Brookhaven (113,000).

Saturation population is the population which can be expected if all available land were to be developed according to existing zoning. It is estimated that Suffolk County's saturation population is 1.75 million persons, and may be approached starting around the year 2030. The saturation population figure represents a 19% increase over the 2004 population figure for the County.

The County's projected saturation population has declined significantly in recent decades. In 1962, the saturation population was projected to be 3.4 million people in Suffolk County. Due to zoning changes, land preservation efforts and lower average household sizes, a much lower saturation population is now expected.

AGE OF THE POPULATION

The median age of the County's population in 2000 was 36.3 years, compared to the State's

median of 35.9 and the national median of 35.3. In recent decades, the median age of the population in Suffolk has been increasing. The median age of Suffolk residents was just 33.5 in 1990, 29.9 in 1980 and 26.4 in 1970.

School-age Population

Because of changing numbers of births, the pre-school (age 0-4) population in Suffolk County grew by more than 7,000 or by 8% during the 1990s, but then declined by 4,400 between 2000 and 2003. Between the censuses of 1980 and 1990 this pre-school population increased by 6% after declining by 22% in the 1970s.

Suffolk County's public school enrollment declined more than one-third from a peak of 331,000 in 1976 to 214,000 in 1990. These declines led to the closing of over 70 schools in Suffolk County. Public school enrollment in Suffolk County has increased every year since 1991 and continues to grow, although enrollment is still far below the levels of the 1970s. The high levels of births in Suffolk County since the late 1980s has led to crowding in some public schools. Many school districts have reconfigured the grades contained in their schools or opened new schools to accommodate increasing enrollments. Public school enrollment increased to 260,000 in 2003 but was still 20% lower than in the peak years of the 1970s. Enrollment is projected to increase more slowly in the coming years, by about 1% annually through 2007.

The teenage population in Suffolk County declined considerably from 1980 to 1990 by 28%. It is this change that contributed to the sharp decline in the number of high school graduates during the 1980s. The number of teenagers declined again by 4% between 1990 and 2000, but the number of teenagers has started to increase, which will cause the number

of high school graduates to increase for at least the next several years.

Young Adult Population

The population aged 20-34 is an important group to analyze because this population represents our young workers. The population in this age group in Suffolk County was 271,000 in 2003, an increase of 1.7% over the 2000 figure. However, the 2000 figure was 19% lower than the 1990 figure. Yet many of these age group population shifts are influenced by social factors at the time when these people were born. In this case, many of the people in the age 20-34 group in 1990 were baby boomers who aged out of this group by 2000, replaced in 2000 by baby “busters” who are smaller in number.

Senior Citizen Population

Persons aged 65 and over are a fast-growing segment of Suffolk County’s population. In 2003, there were 176,000 persons aged 65 and over in Suffolk, comprising 12.0% of the population. In 1990, seniors aged 65 and over represented 10.7% of the population, up from 9.0% in 1980 and 7.6% in 1970. The total number of seniors rose by 18% between 1990 and 2000 after an increase of 22% in the 1980s and 35% in the 1970s. Between 2000 and 2003, the number aged 65 and over increased by another 5%.

The 2000 census revealed that 35,000 or 22% of the County’s senior citizens live alone, and that 25% of Suffolk County households contain a senior citizen. These figures are even more striking in the five eastern Suffolk towns: 18% of the population is aged 65 or over and 33% of all households contain a senior citizen.

Senior citizens migrate to Suffolk County from other nearby counties for a variety of reasons. Sometimes a senior citizen’s children or grandchildren already live in Suffolk, and

housing in Suffolk is less expensive than in Nassau. Suffolk contains more units of market rate senior citizen housing than Nassau County. Suffolk’s senior condominiums draw residents from Suffolk and Nassau Counties and beyond. About one-third of residents in newly constructed senior citizen condominiums in Suffolk are previous Nassau County residents, and about 10% come from New York City.

HOUSEHOLD SIZE

The average household size in Suffolk has decreased significantly in recent decades. Average household size in Suffolk peaked at 3.7 in 1967. Household sizes began to decline in the 1970s and averaged 3.04 by 1990. In 2000 the average Suffolk County household size was 2.96 people, and remained at 2.96 in 2004. No further significant declines in household size are expected.

New housing developments tend to contain younger families and larger household sizes. As an area’s residents and housing mature, household sizes tend to decline, causing the total population to decline. This is especially true as development approaches saturation conditions and little new housing is built. Nassau County had a net loss of over 100,000 people between 1970 and 1980 mostly due to a declining average household size. Suffolk County similarly had a major decline in household size over that time period but total population did not decline because of the addition of 90,000 new households.

RACE AND ETHNICITY

Suffolk County’s population is mostly White and in 2003, non-Hispanic Whites made up 76% of the population. Hispanics are now the largest minority group in Suffolk and numbered 183,000 or 12% of the population in 2003. Blacks numbered 119,000 or 8% of the total

and there were 45,000 Asians comprising 3% of the population. The American Indian population in Suffolk County was 4,900 in 2003, less than 1% of the population.

Suffolk County continues to become more racially diverse. Between 1990 and 2000, the non-Hispanic White population declined by 1% while the Black population rose 19%, the Hispanic population increased by 70%, and the Asian population grew by 52%. Between 2000 and 2003, the Hispanic group increased by the largest raw number, but the fastest growing group in percentage terms was Asian, whose population increased by 25% between 2000 and 2003 in Suffolk County. By the year 2020 Long Island is projected to be 59% White, 17% Hispanic, 15% Asian, and 9% Black.

Three ancestry groups dominate Long Island's population. Suffolk County has more persons of Italian ancestry than any county in the United States. Italians make up 29% of the County's population, Irish persons comprise 23% and Germans make up 17% of the population. There are more people of Irish and German descent on Long Island than in all of New York City.

Of Suffolk County's Hispanic population, one-third were Puerto Rican, based on 2000 census data. The next largest Hispanic groups were (in order) Salvadoran, Dominican, Colombian, Mexican, and Ecuadorian. Half of Suffolk County residents who spoke Spanish also speak English very well, based on 2000 census data.

INCOME

Personal and Per Capita Income

Total personal income of Suffolk residents was \$54.8 billion in 2002, ranking 5th of all counties in New York State. The County's 2002 per capita personal income was \$37,650, ranking 6th in New York State. Suffolk's per capita income was 22% higher than the national average of

\$30,906. Of 3,111 counties in the United States, Suffolk's per capita income ranked 93rd highest in 2002.

Household Income

According to the 2000 U. S. census, Suffolk County's median household income was \$65,288 in 1999. In 2004 dollars, the County's median household income is estimated to be \$75,500. Suffolk County's median household income ranked 34th of all counties in the U. S. *Sales and Marketing Management* has consistently ranked Long Island (Nassau-Suffolk) as having the highest income of the largest 20 metropolitan areas in the country. According to the *Sales and Marketing Management* 2001 "Survey of Buying Power," the median household effective buying income in the Nassau-Suffolk area was \$60,941, 56% above the national average of \$39,129.

Poverty

Suffolk County's poverty rate is among the lowest in New York State, yet in 1999, 86,000 persons or 6.0% of the population were living in poverty, according to the U. S. Census Bureau. This figure is based on a national poverty threshold which was \$17,463 for a family of four in 2000. In a relatively high cost area such as Suffolk County, poverty can be easily understated because the thresholds are based on a national standard. Nonetheless, in 1999, 24,000 or 6.7% of persons under age 18 in Suffolk County lived in poverty as defined by the Census Bureau.

HOUSING

Long Island has a very high percentage of owner-occupied housing units. In 2000, 80% of Long Island's occupied housing units were occupied by their owners, far above the nationwide figure of 66% and second highest of the 75 largest metropolitan areas. Long Island

also has one of the lowest housing vacancy rates in the country. The homeowner vacancy rate in Nassau-Suffolk was 0.8% in 2004, indicating a tight market, but the vacancy rate in rented housing units increased to 7.5%, indicating some softening in the rental market.

Since mid-2006, the Suffolk County housing market has softened. Prices remain very high, however. As of November 2007 the median used home selling price in Suffolk County was \$400,000, down 2% from November 2006. Median housing prices in 2007 were still more than double what they were in 2000. Suffolk County housing prices tripled during the 1980s but declined by about 12% between 1989 and 1995, becoming somewhat more affordable. However, housing prices began to increase more rapidly in 1999. In 2001 prices rose by 17%, followed by increases of 21% in 2002, 18% in 2003, 12% in 2004, 12% in 2005 and 3% in 2006.

Housing sales and construction have slowed considerably. It is expected that in 2007 approximately 9,500 Suffolk County homes were sold through the Multiple Listing Service, a level last seen in the mid-1990s when housing prices were much lower. In 2005, 13,201 Suffolk County homes were sold, a record high number and 25% higher than the number of homes sold in 2001 and 50% more than the 1995 figure. The value of new residential construction in Suffolk hit an all-time high of \$1.15 billion in 2005, but declined by 37% in 2006 and by another 15% in 2007 to \$619 million, similar to the level in 1998 before the dramatic rise in home prices.

The number of building permits issued for new housing in Suffolk County has also declined significantly. In 2007, there were 2,001 new housing units authorized by building permit in Suffolk County, the fewest number in any year since 1950, a 22% decline from the 2006 figure and 54% lower than in 2002. For decades, Brookhaven Town has led the ten Suffolk

County towns in the number of new housing unit permits issued. In 2007 this still held true but the number of new housing units authorized in Brookhaven was only 511, the lowest number for Brookhaven since records began in 1950. The amount of vacant land available for future development is becoming more limited.

Housing rents have remained fairly steady in recent years. A Suffolk County Planning Department analysis of apartments for rent in *Newsday* showed that in early 2007 in Suffolk County the average rent for a one-bedroom apartment was \$1,102, a slight 5% decline since 2003. However, the 2007 figure was 41% higher than the 1999 figure. An average two bedroom apartment rented for \$1,500 in 2007, up 5% since 2003 and 37% higher than the in 1999. In a ranking of median gross rent according to the 2000 U. S. census, Suffolk County ranked 11th highest among all counties in the nation.

After relatively little rental apartment construction in the 1980s, construction of apartment complexes for seniors and non-seniors has increased substantially in recent years. In the 1980s, nearly 1,700 units of market rate senior apartments were constructed in Suffolk County, and 2,800 units were constructed in the 1990s. Already since 2000, more than 3,500 senior citizen apartment units have been built. Non-senior apartment construction has increased just as dramatically. In the 1980s in Suffolk, 885 market rate apartment units were built, followed by 2,500 units in the 1990s, and 2,950 units already since 2000. Many of these new complexes charge rents in excess of \$1,500 for a one-bedroom apartment.

ECONOMY

Long Island has a large and diverse economy. Its gross metropolitan product, the total output of goods and services produced, was estimated to be \$122 billion in 2003. This figure was 16th

largest of all metropolitan areas in the U. S., and larger than countries such as Malaysia, Venezuela, and Israel.

Employment

Suffolk County continues to experience solid employment conditions. As of February 2005, 725,500 Suffolk residents were employed, up 1.5% from a year earlier. Employment on Long Island was 1,211,900 in February 2005, an increase of 14,200 or 1.2% from the previous year. The “professional and business services” category experienced the largest over-the-year increase (3,900 or 2.7%), followed by “health care and social assistance” (an increase of 3,700 or 2.3%) and “leisure and hospitality” (3,500 or 4.1%). The largest declines in jobs occurred in federal government employment (-600 or -3.0%) and non-durable goods wholesalers (-500 or -2.0%).

During the period from 1980 to 1988, employment on Long Island grew by 239,000 or 24%. But the combination of a recession and defense cutbacks caused the loss of 88,500 jobs (nearly 8% of the job total) on Long Island in the period from 1989 to 1992. Between 1993 and 2000, Long Island gained 168,900 jobs. In 2001, employment growth slowed considerably, and 6,600 jobs were lost in 2002. Modest job growth took place in 2003 when 7,200 jobs were added and in 2004 when 10,800 jobs were added.

After significant manufacturing job losses between 1986 and 1994, employment in Nassau-Suffolk’s manufacturing sector stabilized in the late 1990s. Manufacturing jobs on Long Island declined moderately between 2000 and 2003 but have been stable since 2003. Employment in durable goods manufacturing declined from 96,600 in 1990 to 64,900 in 1995 and was 53,200 in February 2005. Employment in the manufacture of chemicals is one relatively bright spot in manufacturing, increasing by 24% in the past ten years, from

8,400 jobs in 1995 to 10,400 jobs in February 2005.

Transportation equipment manufacturing jobs, almost exclusively defense related, declined from 17,900 in 1990 to 6,900 in 1998, and was 5,300 in February 2005. Yet since 2003, employment in defense-related industries has increased on Long Island due to higher military spending. It is expected that defense companies on Long Island will need another 3,000 employees over the next three years. Defense contract awards to Suffolk firms in 2003 totaled \$609 million, up 53% over the 2001 figure but still lower than the 1990 figure.

The employment base on Long Island has become more diversified in the past ten years. A study of 2002 data indicated that Suffolk County’s economy was the second most diversified of the 62 counties in New York State. The loss of defense jobs in the 1980s and 1990s hurt the Long Island economy but allowed the economy to become less dependent on one industry. Long Island can now depend on several growth sectors, including health, educational and social services, tourism, the arts, and several emerging technologies, notably bioscience technology. Long Island’s bioscience research community is expected to continue to expand, and the major players are Cold Spring Harbor Laboratory, SUNY Stony Brook, Brookhaven National Lab, and the North Shore Health System.

Unemployment and Inflation

Suffolk County continues to experience low unemployment. The unemployment rate in Suffolk County has been consistently lower than the national rate and remains relatively low. In February of 2005 there were 36,900 unemployed Suffolk residents, 4,600 fewer than the number unemployed in February 2004 but 36% more than in the strong economy of February 2000. Suffolk’s 4.8% unemployment rate is better than the 5.5% rate of the previous

February and is still considered close to a “full employment” rate (defined as below 4%) and remains lower than the rate in New York State (5.6%) and the United States (5.4%) but higher than in Nassau County (4.4%).

Inflation remains moderate in the region, but it has increased slightly. The consumer price index for the New York metropolitan area increased by less than 3.2% in each of years 1993 through 2003. Inflation for 2004 was 3.5%, and inflation has been running at 4.0% thus far in 2005.

Major Employers

In 2005, 35 private employers each had more than 2,000 workers on Long Island. These employers cover a wide range of industries, including health care, telecommunications, banking, educational institutions, and department stores. The North Shore Health System, a network of 14 hospitals and other health care centers, is Nassau-Suffolk’s largest employer, has nearly 32,000 employees in 2005. The Diocese of Rockville Centre employs 17,000 in Nassau-Suffolk. Waldbaums supermarkets, North Fork Bank, the Long Island Railroad, and Cablevision Systems (telecommunications) each employ more than 6,000 on Long Island. The next largest employers are the Winthrop Health System (hospitals), Home Depot, Pathmark supermarkets, King Kullen supermarkets, KeySpan (electric and gas utility), Long Island University, and Stony Brook University Hospital, each of which employ between 4,000 and 6,000 in Nassau-Suffolk. Other companies employing at least 2,000 in Nassau-Suffolk include United Parcel Service, Brookhaven National Laboratory, *Newsday*, Estee Lauder (manufacturer of cosmetics) and Computer Associates, one of the largest software development companies in the U. S. and headquartered in Islandia in Suffolk County.

Large government employers in Nassau-Suffolk include 127 school districts which together employ 96,000 people, state government which employs 25,000, and federal government which employs 18,000 (including 9,000 postal workers). Suffolk County government employs 11,000 people.

Grumman Corporation, a defense contractor, had employed 25,000 persons on Long Island in 1986 but by 2004 Northrop-Grumman employed 2,400 persons on Long Island. (Northrop acquired Grumman in 1994.) In 2003 a \$1.9 billion contract was awarded to Northrop-Grumman to upgrade the Navy’s E-2C Hawkeye plane. This is the largest military contract to come to Long Island since the Cold War ended in the early 1990s. This new contract has generated 900 new jobs, primarily electrical and software engineers.

Former Grumman facilities in Suffolk County have been converted to other uses. Grumman’s 175,000 square foot building in Holtsville in Suffolk County was purchased by Symbol Technologies, an industry leader in bar code scanning technology. The building was renovated and expanded to 300,000 square feet and is now the company’s headquarters. A former 260,000 square foot Grumman building in Melville was renovated in 1995 and is now a major office for Olympus. Grumman’s 385,000 square foot facility in Great River is being reused as the Long Island Technology Center, a technology firm “incubator.” Part of Grumman’s 2,900 acre Calverton facility was sold and includes one million square feet of buildings currently reused by various light manufacturing businesses. The remainder of the property has yet to be sold by the Town of Riverhead but may be developed with light industrial uses, hotels, and a residential golf course complex.

The number of businesses located in Suffolk County continues to rise. Of all counties in the U. S., Suffolk County ranked 13th in the number

of business establishments in 2001. There were more than 45,000 business establishments with payroll in 2002 in Suffolk, an all-time high and a 9% increase since 1998. The largest number of businesses are in the retail trade category; followed by construction and “professional, scientific & technical services.” Sixty-two percent of Suffolk’s businesses employ fewer than 5 persons, and 79% of businesses in Suffolk employ fewer than 10 persons. In addition, in 2002 Suffolk County had more than 100,000 “non-employer” firms, mostly self-employed individuals operating very small unincorporated businesses.

Suffolk County contains fifteen communities which each contained more than 10,000 jobs in 2000 according to the U. S. Census Bureau. Employment in these areas is high because of concentrations of office, industrial, or institutional development. The largest employment centers in Suffolk County are Melville, Hauppauge, and Farmingdale, which each contain more than 30,000 jobs. Melville alone has 54,000 jobs.

Office and Industrial Markets

Suffolk County now contains more than 22 million square feet of private office buildings. The 9 million square feet of office space built during the 1980s was eventually absorbed as there was not much new office building construction in Suffolk in the early 1990s. But since 2000, more than 2.5 million square feet of new office space has come on the market. Some of this space has been created by the conversion of older industrial buildings to higher office uses. Several speculative office projects are now under construction and proposed in the County, the largest volume of speculative construction underway in over a decade. More than 2.4 million additional square feet of new office space has been proposed in Suffolk County.

The office market in Suffolk County is currently strong and stable. Leasing and sales activity has been increasing steadily since 2003, highlighted by eight consecutive quarters of positive net absorption through year-end 2004. The office vacancy rate in Suffolk for the fourth quarter of 2004 was 12.7%, up from 11.7% in 2003, predominantly due to new construction adding more than 500,000 square feet to the market. Available space is expected to increase in 2005 due to banking industry consolidations. Average office rental rates have remained fairly stable over the past year, \$21.21 in the fourth quarter of 2004, still slightly below the more than \$24 per square foot of 2001. Land costs for office development are sometimes as high as \$800,000 to \$1 million per acre.

Suffolk County’s industrial market remains strong. According to Grubb & Ellis, at year-end 2004 there was 85 million square feet of industrial square footage in Suffolk County, nearly two-thirds of the industrial space on Long Island. The average asking rental rate in Suffolk County for industrial space was \$6.50 in the fourth quarter of 2004, among the highest in the nation but lower than Nassau County’s rate of \$6.75. Rental rates are expected to increase further as available inventory gets absorbed.

The industrial vacancy rate has been dropping since 2002 and is expected to continue to improve. According to Grubb & Ellis, Suffolk County’s industrial vacancy rate was 5.4% at year-end 2004, among the lowest vacancy rates in the nation. In higher value areas such as Melville and Hauppauge, some industrial buildings have been converted to office buildings (and some industrial properties have been purchased for retail and mini-storage facilities), contributing to the improving industrial vacancy rate. There is also pressure for some industrially zoned land to be developed for housing. These new uses are pushing some warehousing, distribution and manufacturing companies further east in

Suffolk County, where land is available for new industrial construction. The industrial market is seeing continued commitment from major companies in the form of lease renewals. In addition, land supply and available inventory remain tight. The County's industrial market is expected to continue to improve as the economy continues to improve, providing a business climate for companies to grow and require new space.

Increasing demand for space has spawned significant new industrial construction. Forest Laboratories, a drug company, expanded its Commack warehouse facility by 186,000 square feet in 2004 and plans to expand its other Suffolk County facilities. Industrial construction continues to take place in the Yaphank area. The 300 acre Heartland Business Center industrial park in Brentwood opened in 1990 and is already home to 3.5 million square feet of industrial space and 3,000 workers. An adjacent 87 acre parcel has recently been opened for development and could add 1.3 million square feet of space and 1,000 jobs to the industrial park. Alcan Packaging, a company that considered moving its operation off Long Island, plans to build a new 200,000 square foot building in Heartland Business Center. The area around Long Island MacArthur Airport also continues to receive new office and light industrial construction, adding more than one million square feet of industrial space in the past few years. A 127,000 square foot industrial building at Johnson Avenue in Bohemia was completed in late 2004.

There is a \$50 million proposal by Suffolk County to triple the sewage treatment capacity in the Hauppauge Industrial Park, the second largest industrial park in the country. This sewage system upgrade will allow more businesses to hook up to the new system, which would have environmental advantages and would reduce costs to businesses already connected to the existing system. The upgrade

also would accommodate the trend toward converting warehouses to office space.

Hotels and Motels

Suffolk County's extensive industrial, office, and tourist markets support a large number of hotels, motels, and bed & breakfast inns. Suffolk has 304 hotels and motels, which together contain 11,626 rooms, and 23% of those hotel/motel rooms are seasonal in nature. These seasonal lodging properties are open only during the warmer months and are located in eastern Suffolk County.

The lodging industry continues to show signs of softening in Suffolk County. Occupancy rates in western Suffolk's hotels and motels steadily rose between 1991 when occupancy was 57%, to 80% in 1999, but then began to decline as new hotels were constructed and the local economy softened. For 2003, occupancy levels in western Suffolk were 71%. Average daily hotel room rates increased by double digit percentages in Suffolk County in the late 1990s until 2000 but have since declined slightly.

After tremendous hotel construction in Suffolk County in the 1980s, several local hotels went into bankruptcy and some closed permanently. No major new hotels opened in Suffolk between 1991 and 1998. But as a result of higher occupancy and room rates in the late 1990s, 12 major new hotels have started construction in Suffolk County since 2000. An Extended Stay America hotel opened in 2000 in Melville and a Holiday Inn Express opened in Hauppauge in 2001. In 2002, three major hotels opened in Suffolk: a Hampton Inn in Medford, a Courtyard by Marriott in Lake Ronkonkoma (both near the L. I. E.) and a Marriott Residence Inn in Hauppauge. In 2003 a Hilton Garden Inn opened in Ronkonkoma and the Inn at East Wind opened in Wading River. Within the past year, three hotels opened in close proximity to the L. I. E.: a Wingate Inn in Brentwood, a Marriott Residence Inn in Holtsville and a

Homewood Suites in Melville. The following hotels are currently under construction in Suffolk County: a Hilton Garden Inn in Melville, a La Quinta Inn in Bohemia and a Holiday Inn Express in Calverton.

Numerous large new hotels have been proposed to be built in Suffolk County but have not yet started construction. Since 2000, 15 additional new hotels have been proposed for Suffolk County, each with more than 100 rooms and many with suites. In the past five years, more than 20 new small bed & breakfast inns have opened in eastern Suffolk County.

Retail Market

Retailers are attracted to Suffolk County because of its relatively high income, high retail sales levels, and population density. According to *Sales and Marketing Management's* 2001 Survey of Buying Power, Nassau-Suffolk had \$42 billion in retail sales or \$46,368 in retail sales per household, which ranked third among the nation's 20 largest metropolitan areas and 35% above the national average. Suffolk's retail sales tax revenues increased by 13.4% in fiscal year 2003 over fiscal year 2002.

Suffolk's shopping centers total 37.0 million square feet. The County's downtown centers have 8 million square feet of retail space. After relatively high vacancy rates in shopping centers and business districts in the mid-1990s, most centers are experiencing fewer vacant stores in recent years. Vacancy rates in 2000 were 8.1% in downtown areas and 12.0% in shopping centers, still historically high but much improved since the last Suffolk County Planning Department analysis in 1996. Proposals exist for 5,000,000 square feet of new retail in stores or centers 100,000 square feet or larger in Suffolk County.

A retail building boom has taken place in Suffolk County since 1990. Nearly one-third (31%) of the shopping center space was built

since 1990. More than eight million square feet of retail space was added in the 1990s, and since 2000 another three million square feet has been added. More than 25 "big box" stores over 100,000 square feet have been constructed in Suffolk since 1993.

In 1999 the discount department store chain Target entered the Suffolk County market and has opened seven new stores in Suffolk County and is building a store in Medford. An additional store is proposed for Holbrook. In the past four years, B J's wholesale club built new stores in South Setauket and East Farmingdale and now has four Suffolk locations. Costco hopes to open a fifth Suffolk County store in Riverhead. Home Depot continues to open new stores in the county and now has 13 stores in Suffolk, with three additional stores proposed. Meanwhile, Lowe's (a Home Depot competitor) opened a new store in Medford in 2002 and at least two more stores are proposed (Rocky Point and West Bay Shore). Kohl's department store chain entered the Suffolk County market in 1999 and has opened seven stores, most of which were previously occupied by Caldor. Best Buy, a national retailer of home electronics and appliances, opened its first Suffolk County stores in 2000 and now has six stores in Suffolk County. Wal-Mart entered the Suffolk County market in the late 1990s and now has five stores in the county, with plans to build new stores in East Farmingdale, Commack and Riverhead. Stew Leonard's, a large fresh food supermarket, has plans to build a new 122,000 square foot store by Republic Airport in East Farmingdale.

Suffolk County's three regional malls underwent significant expansions in the late 1990s. In Bay Shore, the South Shore Mall in 1997 was renovated and expanded by 400,000 square feet, adding a Lord and Taylor department store. In 1999, the Walt Whitman Mall in South Huntington completed a major renovation and expansion. Two new department stores were added to the mall, Bloomingdale's

and Saks Fifth Avenue. A proposed 850,000 square foot shopping center in Yaphank in east central Suffolk County has yet to begin construction. The Tanger Outlet Center in Riverhead expanded in 1997 to become the nation's fifth largest manufacturer's outlet center at 777,000 square feet. Tanger has proposed building another outlet center (790,000 square feet) in Deer Park.

Downtown revitalization continues in Suffolk County. Plans call for a new 28,000 square foot building on Main Street in downtown Riverhead to house Suffolk County Community College's culinary arts school. The school is expected to open in 2006. In addition, the Riverhead Business Improvement District and the Port Jefferson Business Improvement District each recently received \$200,000 grants from New York State's Main Street Program for facade improvements or renovations.

Tourism and Recreation

Tourism is an important part of Suffolk County's economy, especially in the more rural eastern portion of the County. Its 986 miles of shoreline and over 70,000 acres of parkland make Suffolk County a very attractive place to live or visit. Suffolk County has 38,000 seasonal homes, more seasonal homes than all but six counties in the country.

Golf courses abound on Long Island. There are 135 public and private courses on Long Island, with more than half (81) located in Suffolk County and several more are proposed. Since 1992, 13 new public golf courses have opened in Suffolk. The U. S. Open golf tournament took place at Bethpage State Park in 2002 and at Shinnecock Hills Golf Club in 2004.

In 1999, a retail/entertainment center opened at the site of the former Fairchild Republic manufacturing site in East Farmingdale on the Nassau-Suffolk border. This complex includes the Farmingdale 14 screen multiplex theater,

the 400,000 square foot Airport Plaza shopping center including Home Depot, Border's Books and other retailers, and Jillian's, a 60,000 square foot indoor recreation and entertainment complex. A new multiplex theater recently opened at exit 62 of the L.I.E. in Holtsville. New multiplex theaters have been proposed for Elwood, Riverhead, West Babylon and Deer Park.

A \$16 million 6,000-seat baseball stadium opened in 2000 near the New York Institute of Technology and the new federal and county court complexes in Central Islip. The Long Island Ducks baseball team, part of an independent league, plays at the stadium. Suffolk County entered into contract with a private contractor who operates and manages the County-owned facility. In 2002 SUNY Stony Brook completed its new \$25 million stadium, the largest outdoor sports arena in Suffolk County, an 8,254 seat venue that will be used for concerts and other events. Dowling College broke ground in mid-2004 on a new \$20 million 87,000 square foot student activity center at its Shirley campus, including a gymnasium, a fitness center, dining hall, offices and classrooms.

In 2000 a new \$20 million 42,000 square foot aquarium opened in Suffolk County, the Atlantis Marine World aquarium in downtown Riverhead. The aquarium attracted 500,000 visitors in 2001. A large expansion of the aquarium is planned, including a hotel and conference center. Another aquarium, the \$62 million 85,000 square foot Long Island Aquarium and IMAX theater, has been proposed for Brentwood as part of the redevelopment of the Pilgrim Psychiatric Hospital property.

A 200,000 square foot astronomy museum known as Museum of the Universe has been proposed for Long Island but has not yet found

a site. The museum would include a 3D IMAX theater, a planetarium, and a separate children's museum on astronomy.

Farming

In 2002, the annual market value of crops produced in Suffolk County was \$201 million. Suffolk County continues to lead all New York State counties in the wholesale value of all agricultural products sold. Suffolk is first in New York State in the production value of potatoes, cauliflower, broccoli, and nursery and greenhouse products. Suffolk now accounts for 43% of all the market value of nursery and greenhouse products produced in New York State. Once famous for oysters, potatoes, and ducks, Suffolk County is now well-known for its quality wines. The harvesting of grapes for wine production is a relatively new agricultural industry that emerged in Suffolk County around 20 years ago.

Farming and tourism in Suffolk County are interrelated. Farmland provides an open and rural character that offers a change from the congested areas in and around New York City. Eastern Suffolk's numerous farm stands offer fresh local produce to local residents and visitors. Several downtown areas in western Suffolk have green market programs where local produce is sold.

In 2002, Suffolk County's farmland totaled 32,500 acres, the vast majority of it in eastern Suffolk. However, farmland acreage is decreasing by about 1,400 acres per year. Suffolk County's "purchase of development rights" program to protect farmland began in 1974 and was the first such program in the United States. To date, the program has preserved 7,600 acres of farmland.

Other Major Development Activity

The area which formerly contained the Central Islip Psychiatric Center continues to undergo

major redevelopment. Suffolk's \$128 million, 500,000 square foot Cohalan County Court Complex was completed in 1996 and the \$212 million, 822,000 square foot federal courthouse opened in 2000. The federal complex is one of the largest federal courthouses in the country. Next to the courthouses, Touro Law School is currently building a new \$33 million 200,000 square foot law school, and a \$16 million ballpark where the Long Island Ducks play opened in 2000. Courthouse Corporate Center, a 175,000 square foot office building opened in 2000 in a building once used by the Psychiatric Center, a large shopping center with a supermarket opened across Carleton Avenue in 2001, and a 153-unit senior apartment complex opened in 2003. Future development proposed for the site includes restaurants, a Hampton Inn hotel, and more than 700 multi-family units for seniors and non-seniors, including 250 affordable units.

In 2002, a 460 acre portion of the Pilgrim State Psychiatric Center in Brentwood were sold by New York State to a developer and a \$4 billion mixed-use community has been proposed for the site, containing 1,000,000 square feet of upscale lifestyle retail, 9,000 units of mid-rise rental housing, 3 million square feet of offices, a hotel, a cultural center and the Long Island Aquarium. The development would be built on a pedestrian-friendly grid street system and would contain public and semi-private recreation and open space. The first phase will take five years to complete. An environmental impact statement is nearing completion.

The 408 acre Long Island Developmental Center in Melville, another state surplus property, was sold in 1998. Development of the site was completed in 2004 with 1,375 mostly senior housing units and an 18 hole golf course. New York State is also offering 370 acres of the now closed Kings Park Psychiatric Center for sale for development. Two separate

developers had been interested in creating mixed-use projects at the site but then decided not to pursue the project.

Quality King, a distributor of pharmaceutical, health and beauty products, is building a major expansion to support its growing operations. The privately held company, which employs 1,400, is building a 560,000 square foot flagship warehouse building on 37 acres in Yaphank within the New York State Empire Development Zone there. The building is one of the largest of its kind on Long Island built in many years.

TRANSPORTATION

Traffic congestion is a problem in Suffolk County that has increasingly worsened during the last 25 years. While the population in Suffolk has increased only modestly in recent decades, the number of registered vehicles has increased faster, to 1.2 million, and the number of licensed drivers increased to 1.1 million in 2004. Meanwhile, for about 20 years after construction of the Long Island Expressway was completed in 1972, New York State did very little to increase traffic capacity on Long Island. In 1992, construction began on a high occupancy vehicle (HOV) lane for the Long Island Expressway to help manage congestion. The \$880 million lane, now nearly completed, runs for 40 miles from the Nassau/Queens border to exit 64 in Medford.

Because of the increase in local job opportunities in recent decades, 73% of Suffolk's workers now work in Suffolk County and 87% work in Nassau-Suffolk. Most Suffolk

County work trips are fairly local, lasting a median of 32 minutes. But because the population and the major employment centers in Suffolk are dispersed, it is difficult to effectively serve the population with mass transit. During the 1980s, the number of Suffolk workers who drove alone to work increased by 43% while the number of people who car pooled declined by 35%. In the 1990s the number who drove alone increased further by 3% and the number who car pooled declined further by 3%. Use of public transit to travel to work increased by 18% in the 1980s (mostly due to Suffolk's new bus system) and by 2% in the 1990s.

The Long Island Railroad put new dual-powered locomotives and new train cars into service in 1998. These trains can travel directly to Manhattan without forcing riders on the Port Jefferson and Montauk branches to change trains en route to Manhattan.

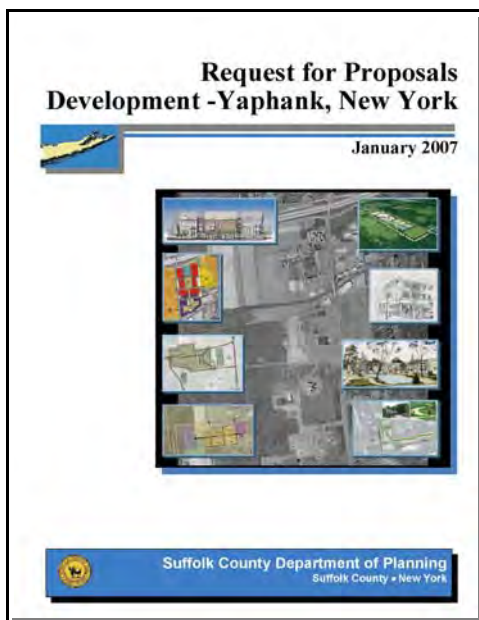
In 1999, Suffolk County's Long Island MacArthur Airport finished a \$13 million improvement project. Improvements included a new baggage claim area, new ticketing counters and 1,000 new parking spaces. In 1999, Southwest Airlines began service at MacArthur Airport, which has caused a significant increase in passenger traffic. Passenger traffic doubled between 1998 and 1999 at MacArthur and was 1.92 million in 2003, twice the level of five years ago. In August 2004, Southwest airlines completed a \$55 million terminal expansion at the airport, including a new 154,000 square foot concourse and four new flight gates. The airport's five carriers now have about 100 flights daily.

ACCOMPLISHMENTS

County-wide Planning and Inter-municipal Coordination

Sagtikos Land Use and Transportation Study - At the initiative of the County Executive, the department has secured a grant of \$500,000 to study traffic congestion mitigation alternatives in one of the largest growth centers in the county. The study is unique in that it is utilizing a cooperative, regional approach to the analysis of impacts and the identification of solutions. A RFP for consultant services was issued in October and bids are expected to be opened in January.

Yaphank County Center Revitalization - Significant progress has been made in this regionally significant development proposal. A RFP was issued earlier this year with the participation of the Department of Economic Development and Workforce Housing. The review process for the RFP is nearing completion and it is expected that a developer will be selected in the first quarter of 2008.



Sunrise Highway Growth Center Study - At the direction of the County Executive, the

department has been charged with the task of preparing a plan for a ten mile portion of S.R. 27- Sunrise Highway extending through the towns of Brookhaven and Islip. Significant staff work has been completed for the project including field work. A report and recommendations are expected in the first quarter of the new year. The study is especially significant given the active participation of both towns and NYS DOT and is an example of the regional/ interagency cooperation called for by the County Executive.

Services to the Long Island Regional Planning Board - The department provides extensive services to the LIRPB including direct staff contributions as well as on-going technical assistance.

Services to the Suffolk County Planning Commission

- ***Review of over 2000 municipal land use referrals*** - The department completed the review of matters referred to the Suffolk County Planning Commission from the 42 municipalities of Suffolk County pursuant to NYS General Municipal Law section 239 and the Suffolk County Charter section A14-14.

Table 1. Applications Referred to the Suffolk County Planning Commission, 2007*

	Applications
ZONING REFERRALS	
Amendments	144
Changes of Zone	46
Expedited Review(1)	49
Master Plans	6
Moratoriums	9
NYS DOT Referrals	0
Site Plans	233
Special Permits	44
Variances	1,766
TOTAL ZONING REFERRALS	2,297
SUBDIVISION REFERRALS	
Major Subdivisions	62
Minor Subdivisions	79
TOTAL SUBDIVISION REFERRALS	141
TOTAL REFERRALS	2,437

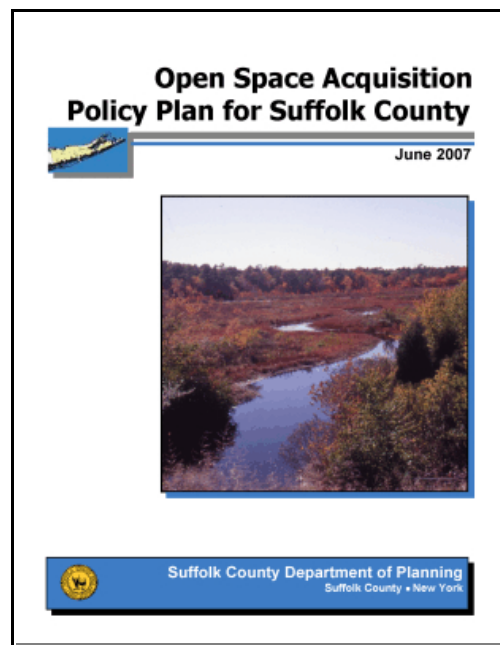
*This excludes incomplete referrals and those referrals that were previously reviewed. (1)IMA with Town of Babylon.

- ***Streamlining of municipal referral process through implementation of Inter-municipal Agreements*** - The Commission staff continued the expedited review process with the Zoning Board of Appeals of the Town of Babylon and the Planning Board of the Town of Southampton via inter-municipal agreements with the Suffolk County Planning Commission. Municipal referrals undergoing review under this procedure are returned to the local referring body within 24 hours of receipt.
- ***Planning Commission training*** - For the second time, the Planning Commission members were provided with customized training by departmental staff. The session was provided in accordance with newly adopted state legislation requiring Planning Commissioners to undergo four hours of training a year in land use and zoning related matters.
- ***Improved Commission staff reports and implemented electronic delivery*** - The department continued the modernization of the Commission process with an enhanced staff report format and electronic delivery of meeting agendas and back-up materials to members of the Planning Commission.
- ***Zoning Action and Subdivision Referral Database*** - the staff continues to utilize the database created to organize municipal referrals pursuant to NYS GML section 239. This electronic system, accessible by all staff members within the division, has greatly reduced information retrieval time by storing application specifics in one central location. The staff regularly looks for ways to streamline and improve this process.
- ***Digital record of referrals*** - In lieu of calculating monthly/annual zoning action and subdivision referral totals manually, the staff has developed an electronic record that

breaks down applications by type and referring municipality. In doing so, the staff is able to monitor referral trends and other land use issues quickly and efficiently.

Protecting Natural Resources and the Environment

Completion of an Open Space Acquisition Policy Plan - The Department completed the *Open Space Acquisition Policy Plan for Suffolk County* in June. The report assesses the County's future open space policies through an historic review of its many acquisition programs. A total of 16 policies were identified to help guide the County's open space acquisitions forward into the 21st Century, a period of time when it will be experiencing the final build-out of its last remaining vacant lands, for natural resource protection, farmland preservation and recreational uses.



Open Space Planning - The Department staff expended considerable effort in identifying potential open space acquisitions; reviewing, mapping and evaluating them according to

various sets of criteria; preparing introductory resolutions authorizing planning steps and/or acquisition of open space; and presenting its findings to several standing committees with mandated responsibilities in the County's open space planning and acquisition process, including the Environment, Planning and Agriculture Legislative Committee, Suffolk County Parks Trustees, Council on Environmental Quality and Environmental Trust Review Board.

Work related to the above includes:

- review and evaluation of proposed acquisitions for the County's Open Space program for Master Lists III and IV;
- review and evaluation of proposed acquisitions presented as part of Legislative resolutions for planning steps advanced by various County Legislators;
- coordination with the Department of Parks, Real Estate, Law and Planning on the development of inter-municipal agreements and the future use of structures on certain proposed County parks for both active and passive recreational uses;
- review and presentation of Suffolk County Department of Health Services (SCDHS) Board of Review TDR proposals wherein properties are proposed through Legislative approval to be donated to the County

Department of Parks, Recreation and Conservation for passive recreation uses;

- review of tax lien parcels for environmental characteristics and parkland uses thereby making recommendations for those parcels to be transferred to the County Department of Parks, sold to an adjacent owner or sold at auction.
- conducting comprehensive research on individual County park properties (ownership verification, acquisition program, deeds and deed restrictions, transfer of property to Department of Parks jurisdiction, etc.) identifying park uses and/or restrictions to certain types of uses, such as active vs. passive uses.

Comprehensive Water Resources Management Plan - This work is being conducted by the Department of Planning under an agreement with the SCDHS. The existing land use maps and land use report for the five western towns have been completed and submitted to the SCDHS. There was a delay by SCDHS in providing the Department with both the zones of contribution for 30 impacted public supply wells and digitized, registered files of historic aerial photos that will be used to prepare estimates of land use and population trends for the contributing areas to these wells.



Fire Island at the Shinnecock Inlet.

Fire Island to Montauk Point Reformulation (FIMP) Study - Department staff attended various Corps of Engineers briefings on the status of this long-term project during 2007, including the resumption of participation on the FIMP Interagency Reformulation Group (IRG). Technical memoranda were prepared on the Corps' *Formulation Report*, and on the County response to dune/beach fill, breach closure and non-structural alternatives for flood/storm damage reduction along the south shore that are under discussion.

Services to the Council on Environmental Quality (CEQ)

- Staff completed the environmental review of 45 projects before the Industrial Development Agency and prepared the necessary SEQRA documents.
- Staff reviewed 107 environmental assessments and did the field surveys for 63 acquisition/ donation sites in Suffolk County.
- Staff reviewed 2299 Legislative resolutions throughout the year regarding SEQRA classifications and requirements.
- Staff set up, distributed materials and held 12 CEQ meetings during the course of 2007.
- Staff prepared the CEQ recommendations and associated SEQRA documentation for 128 county-initiated projects and filed them accordingly during 2007.
- Staff assisted the Departments of Health, DPW and Environment and Energy in the preparation of the DGEIS and FGEIS on the Vector Control & Wetlands Management

Long Term Plan.

- Staff set up and the CEQ held one Suffolk County Shellfish Aquaculture Leasing public hearing on scoping the DGEIS.
- Throughout the year, staff worked with the Department of Economic Development & Workforce Housing on 11 different projects at Gabreski Airport, from leasing space to building hangars as well as a new Hertz Rental Car Counter and the construction of a noise berm for the neighboring residents.
- Throughout the year staff also assisted the County Executive's Office, DPW, Parks and other departments in the preparation of EAFs and other environmental information concerning SEQRA for projects being presented to the CEQ and legislature.
- Throughout the year staff attended 12 of the Legislature's Environment, Planning & Agriculture Committee meetings and presented the CEQ recommendations, all of which were approved.
- Staff worked with the CEQ Historic Trust Committee on 14 projects. Five properties were recommended by the CEQ for dedication to the Historic Trust. CEQ Historic Trust Committee meetings were attended throughout the year reviewing the custodial agreements for Historic properties. It was recommended that the Homan Gerard House be stabilized and restored. Staff updated the Historic Trust Manual adding new structures to the existing Historic Trust listing and The Historic Trust Manual was retyped in Word format. Staff was also involved in the process of relocating the Big Duck.



Historic photo of the Big Duck

Protecting Marine & Coastal Environments

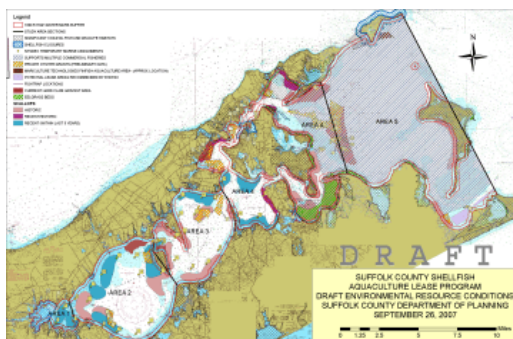
Suffolk County Aquaculture Leasing Program

- The project contract with Cashin Associates, P.C. (CA), 1200 Veterans Memorial Highway, Hauppauge, NY 11788CA was executed by Suffolk County on February 28, 2007. This contract is in the amount of \$500,000. (The remaining amount of \$100,000 for this capital project has been reserved to address other contingencies during the program adoption and implementation phases.)

- Major effort was devoted to the start of technical work on the project, informing the public about the scope of work to be conducted, and soliciting information and opinions from local governments, commercial fishermen, shellfish farmers, environmental groups and other interested parties. Two widely publicized Aquaculture Lease Program Advisory Committee (ALPAC) project kickoff meetings (January 31, 2007 at Southold Town Hall; February 6, 2007 at Southampton Town Hall) and six regular ALPAC meetings in Riverhead were held during 2007. The project base map showing the boundary of the Shellfish Aquaculture Planning Area was established.
- The Department of Planning has created and maintained a website for the project (www.co.suffolk.ny.us/shellfishaquaculture.html). All ALPAC meeting notices, meeting summaries, draft and final project reports and GIS maps are posted on this website when they become available. ALPAC members and over eighty “interested parties” are informed about scheduled

meetings and project progress on a regular basis by email and regular mail.

- The programmatic environmental analysis and SEQR process for the project were initiated. Suffolk County assumed lead agency status for the program, a positive declaration was adopted, and the Department of Planning proceeded with the scoping process in conjunction with the Suffolk County Council on Environmental Quality. This culminated in the adoption of the *Final DGEIS Scoping Document for the Shellfish Aquaculture Lease Program in Peconic Bay and Gardiners Bay* by Res. No. 780-2007, which was adopted by the Legislature on August 21, 2007 and subsequently signed by the County Executive Office.
- CA has proceeded to work on the DGEIS, and initiated an extensive interview and data collection effort in the field to identify use patterns, conflicts and concerns; shellfish culture activities and opportunities; and natural resources information involving Peconic and Gardiners Bays. Draft Environmental Resource Conditions Maps were prepared and subject to review by ALPAC.
- The title search conducted by the Division of Real Estate on +/- 550 underwater oyster grant parcels in Peconic and Gardiners Bays was completed and a database created.
- Three lease program access alternatives were reviewed by ALPAC. Preliminary Draft Shellfish Cultivation Zone Maps and draft lease program administrative components and implementation procedures were presented and discussed.



**Suffolk County Shellfish
Aquaculture Lease Program
DRAFT
Environmental Resource Conditions
September 26, 2007**

Mud Creek Watershed Aquatic Ecosystem Restoration Feasibility Study - The goal of the Mud Creek Watershed Section 206 Aquatic Ecosystem Restoration Project is to restore wetland and stream habitats that were extensively degraded by the operation of a former duck farm located on a 35-acre site in East Patchogue that is now Suffolk County parkland. The Corps of Engineers has demonstrated a federal interest in this cost-shared project, but to date, it has not been successful in securing federal funds in the Corps budget for conduct of the feasibility study and eventual project construction, due to other national priorities. (It did, however, conduct some preliminary soils testing at Mud Creek in December 2006 under the *Characterization of Historic Duck Farm Activity and Restoration Priorities* project discussed below.) The Department of Planning began the implementation of this capital project in 2007 by awarding a consultant contract for the conduct of a Phase I Environmental Site Assessment (ESA) for the former duck farm site.

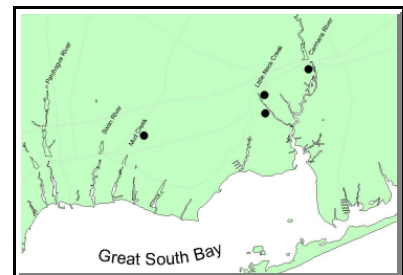
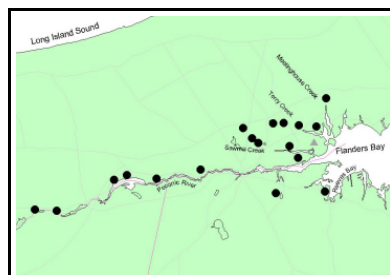
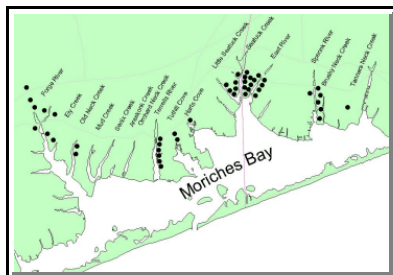
Characterization of Historic Duck Farm Activity and Restoration Priorities - This cost-shared U.S. Army Corps of Engineers Planning Assistance to States project will identify restoration priorities for habitats degraded by historic duck farm activity in Suffolk County.

- The Department of Planning has conducted a literature search on the history of the duck farm industry on Long Island. Through inspection and interpretation of both historic and current aerial photography, staff has

located, calculated acreage and shoreline length, and determined development status of former duck farms. The staff noted the current ownership and municipal zoning for each site, and calculated the acreage and shoreline length of former duck farms that are still available for development. Split image aerial photos showing both historic and current views have been compiled for all former duck farm locations. Staff inspected former duck farm locations and documented current conditions with ground photographs. The above information was forwarded to the Corps for inclusion into the final report that will be prepared by the Corps.

- Staff completed the “Duck Farm Industry Impacts on the Environment” report, and submitted it to the Corps of Engineers in July 2007 as the final component of the Department’s contribution to completion of this project. This report described: the intensity of duck farming as a land use; the on-site impacts of duck farm operation; the off-site impacts of duck waste discharge on surface water quality, and habitat changes associated with the deposition of duck sludge on bay bottoms; historical management practices; and management implications today. A PowerPoint file containing 38 annotated slides referenced in the report was also submitted.
- The Department of Planning has completed its segment of the project report. Preparation of the final project report, including recommendations for proceeding with restoration investigations, is the responsibility of the Corps of Engineers.

Abandoned Duck Farm Sites



Robinson Duck Farm County Park Habitat Restoration Feasibility Study - In response to various stakeholders' interest in support and participation, the Department of Planning established the Robinson Duck Farm Habitat Restoration Work Group with representatives from the Suffolk County Departments of Parks, Recreation and Conservation, Public Works, Health Services, and Environment and Energy; U.S. Fish and Wildlife Service Wertheim NWR; Friends of Wertheim NWR; NYS Department of Environmental Conservation Region I and Town of Brookhaven Department of Planning, Environmental Protection and Land Management. A meeting of this group was convened in late June 2007 in which project background information was presented, and a plan of work was discussed to aid in the preparation of an RFP. A draft RFP was completed in late October 2007 and sent to the Department of Law for review.

Preserving Farmland and the Agricultural Economy

Administration of the Farmland Protection Program - Including planning for the purchase of development rights on active farmland as well as the review of all applications for development on County-owned farmland.

Administration of the Agricultural Districts Program

Farmland Protection Grant - The County received \$5,000,000 as reimbursement from New York State for the purchase of farmland.

Farmland Protection Grant - The County received a \$530,000 grant from the federal government for the purchase of farmland in Riverhead.

Greenhouse Guidelines - The department is working with the Farmland Committee to develop guidelines for the placement of greenhouses on County-owned farmland. This has been a controversial subject during the past year and the department has worked with a committee to seek consensus on appropriate guidelines.

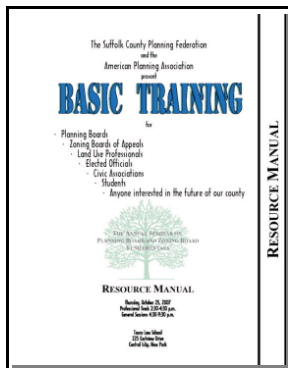


Greenhouses on private farmland in Northville, Riverhead Town.

Professional Assistance to Local Government

Training of Planning and Zoning Board Members - Good planning requires knowledgeable board members that are prepared to deal with the challenges and complexities of today's regulatory environment. The department provides the preeminent service for training on Long Island through the Suffolk County Planning Federation. The Federation held its annual conference in October and drew 175 participants who were offered a choice of nine classes on planning and zoning issues.

Completion of a Training Resource Manual for Planning and Zoning Board Members - The department prepared and released a major training resource manual in conjunction with the conference. The manual includes training materials in ten areas of concentration and is used by planning officials on a regular basis.



Electronic Map Base of Suffolk County - The department has completed an extensive atlas of maps of the county. The maps are posted on the department's web site and contain extensive information including municipal and special district boundaries, environmental features and public facilities.

Completion of an Atlas depicting the Jurisdiction of the County Planning Commission - A series of 36 map atlas within the 42 municipalities of the County were completed and distributed. This will be a valuable aid to the towns and villages in

coordinating the review of local land use applications with the County Planning Commission.

Research and Data Collection, Analysis and Mapping

Completion of Land Use Inventory for all of Suffolk County - With tax map line work for years 2006-2007 from Suffolk County Real Property Tax Service Agency, aerial photography from 2004 and Pictometry aerial photography dated 2006 the cartographic staff was able to update land use for the whole county. The last major update of county wide land use was complete in 1981 and took over four years to prepare and complete. Another update was done for the five Eastern towns only in 2001 and took about 3 years to complete. With the use of Pictometry aeriels the task of completing the 2006 land use took about a year and a half.

Continued response to information and data requests - The County is a major source of data and other information that is used by both public and private agencies. This includes school districts, municipalities, not for profit agencies (often for preparing grant applications) and private sector businesses. About 2,300 requests for information were handled in 2007.

Continued data tabulation and analysis - The department continued to collect and tabulate a variety of data including population estimates by age and race. Tabulated 2006 American Community Survey data. Tracked a number of economic indicators such as the Consumer Price Index, Building Permits, Unemployment, and Labor Force. Assisted the New York Metropolitan Transportation Council (NYMTC) with population projections and LIPA with population estimates.

Completed an update of the County's Official Statement and Economic Overview - This

information is used by the Comptroller and Budget Office for the County's bond ratings.

Update of Demographic, Economic, and Development Trends report - Completed research and rewriting of departmental report that is used to provide important statistical and trend information about the county. Further, continued to track Long Island housing market data including existing, new and proposed housing complexes, sales and price data; shared this information with the County's Director of Affordable Housing and collaborated on affordable housing efforts.

Multi-jurisdiction Multi-hazard Pre-disaster Mitigation Plan - Staff provide technical consultation to the department of Fire, Rescue and Emergency Services (FRES) throughout the year and assisted in the review and preparation of the RFP for the technical consultant responsible for development of the multi-jurisdictional, all-hazard pre-disaster mitigation plan for Suffolk County and participating local governments. Staff also participated on the RFP Evaluation Committee which ultimately selected Tetra Tech EM, Inc. to perform the work required.

Administration of the SOS TDR Program - The department is the designated agency for the collection and distribution of wastewater credits that are generated from certain land acquisitions. This role will increase in 2008 as the amended Drinking Water program takes effect.

Completion of updates to the County Mileage Chart - Changes to the County mileage chart were made as requested by SC Audit and Control. Also made corrections to the Department of Social Services mileage chart. This chart shows the from and to mileage of DSS centers around the county.

Completion of Sex Offender Trailer Location Mapping - A map representing potential sites that could be available for locating trailers in accordance with the County's program. These sites could not be near schools, day cares or County Parks. The cartographic division has come up with a total of 59 sites.

Completed interview process for the GIS Needs Assessment - Bowne Management interview members of the Planning staff to get a better understand of the GIS needs of the department.

Completed maps for the Emergency Interment Alternatives - Twelve possible sites were selected across the County. The information was provided to the Department of health Services.

Completions of a series of four maps for Major Growth and Development Areas Part II - Suffolk County

Completion of maps for additions to the Empire Zone Program - detailed site maps, aerial photos and digital GIS data of sites in the towns of Babylon, Huntington, Smithtown and Riverhead were prepared. The maps and data will be sent to the Empire Zone Program.

Special Projects

Cornell Cooperative Extension - In 2007 the department was given oversight responsibility for the County programs that are administered by Cornell Cooperative Extension. The responsibility includes both financial oversight as well as performance review. This is a significant new function for the department.

Plaza Theater Economic Development Planning

Grants Coordinator Consultant - The department has prepared a RFP for consultant services for this project. The consultant will advise the County of grant opportunities.

Gabreski Airport Planning - Assisted the Department of Economic Development and Workforce Housing in the planning, zoning code amendment and environmental analysis for the Hamptons Business Park Development area located at the airport. The department is also assisting with the review of the master plan for the airport.

Transportation Planning - The department continues to work with the New York Metropolitan Planning Council (NYMTC) and the Long Island Rail Road on several regional transportation projects.



The Suffolk County Farm managed by Cornell Cooperative Extension



Gabreski Airport



Historic HayBarn at the Suffolk County Farm

Professional Planning Services to Boards and Agencies

Department staff performs technical support and coordination functions on a variety of Suffolk County special purpose committees, as well as other advisory entities, including the following:

- Suffolk County Planning Commission
- Long Island Regional Planning Board
- Council on Environmental Quality
- South Shore Estuary Reserve (SSER) Council
- SSER Diadromous Fish Work Group (fish passage structure projects at tributaries)
- Bluepoints Bottomlands Council
- Forge River Protection Task Force (Forge River Watershed Management Restoration Plan)
- Peconic Estuary Program TAC and Management Committee
- Suffolk County Vector Control TAC and Steering Committee
- Suffolk County Dredge Project Screening Committee
- Suffolk County Water Quality Review Committee
- Suffolk County Wetlands Stewardship Committee
- Suffolk County Wetlands Management Work Group
- Fire Island Transfer of Development Rights Work Group
- Suffolk County Comprehensive Water Resources Management Plan Steering Committee
- NYS Dept. of Environmental Conservation Shellfish Advisory Committee
- Long Island Shellfish Managers Group
- NY Sea Grant Program Advisory Committee
- Beaverdam Creek Watershed Advisory Committee (Beaverdam Creek Watershed Management Plan)
- Carmans River Partnership
- Environmental Trust Review Board
- Suffolk County Farmland Committee
- Farmland Subcommittee for the Development of Greenhouse Guidelines
- Suffolk County Agriculture and Farmland Protection Board
- Suffolk County Sewer Agency
- Aquaculture Lease Program Advisory Committee
- Suffolk County Traffic Safety Review Board
- Space Management Steering Committee
- Gabreski Airport Citizens Advisory Board
- Downtown Citizens Advisory Panel
- Central Pine Barrens Joint Planning and Policy Commission
- Pine Barrens Credit Clearinghouse
- Protected Lands Council
- East End Transportation Council
- Wireless Communications Review Committee
- Trap and Skeet Site Review Committee



The Grangebel Park fish ladder allows diadromous fish to travel up the Peconic River to spawn.

GOALS AND INITIATIVES

Comprehensive Planning - Updating the comprehensive plan is a continual process. While we do have many reports on a variety of important topics (open space, housing), we do not have an overall plan that takes a comprehensive approach to the future of the County. The development of a plan is a mandated function of the County Charter and the department will commence the process to update the plan. With the County Executive's proactive approach to the planning of the county's growth centers, the completion of a comprehensive plan would extend his initiative to a regional level and would be a lasting contribution to the future of the County. Staff and/ or consultant resources will be needed to complete the plan update.

Regional Planning - A goal of the department is to work effectively with the newly invigorated regional planning board to address chronic regional problems including housing, traffic and environmental issues. A working relationship that will enable substantive participation by the department is the first goal of this effort.

Inter-municipal Planning - The County Executive has called for better coordination and planning among the municipalities and has provided leadership to advance a regional approach. To further this effort, steps should be taken to encourage and incentivize inter-municipal cooperation that advances regional goals. This should be done with the foundation of the comprehensive plan that can be document that can define the County's vision and plan for the implementation of that vision.

Open Space Planning - As part of the County Executive's ongoing effort to expeditiously

acquire both farmland development rights and environmentally sensitive/parkland open space, the department will continue its efforts to assist in the planning of this important activity with the preparation of Master List V. In particular, the department will seek to assist in the prioritization of property so that the most important parcels receive the highest priority for protection.

Active Parkland Acquisition Criteria - The department will prepare suggested guidelines for the consideration of "Planning Steps" resolutions that contemplate the acquisition of active parkland involving parcels with improved structures. The guidelines will help to identify plans and partnerships that may be associated with the project before the expenditure of funds for appraisals, survey, etc., as well as before the expenditure of significant staff time many departments.

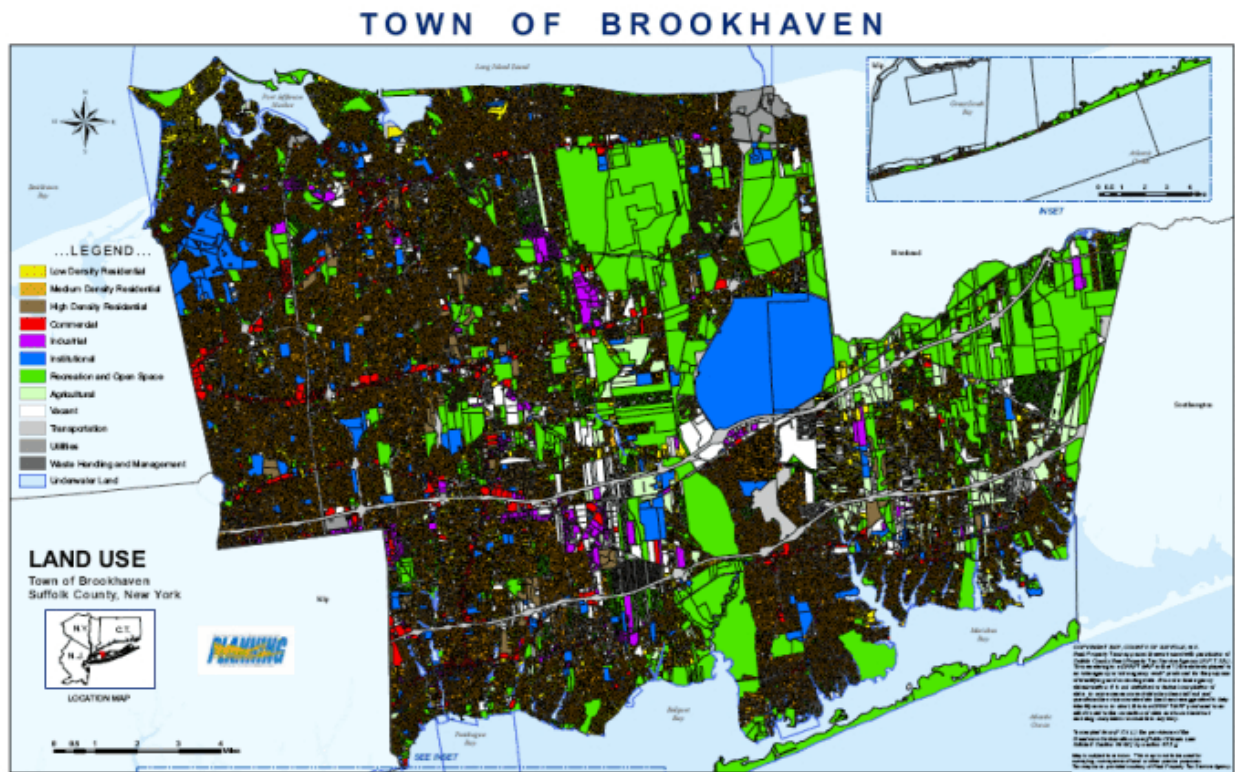
Sunrise Highway Corridor Study - The results of this regionally significant study will be completed in 2008. The study will follow the model of inter-municipal involvement that was utilized in the Growth centers report completed last year.

Aquaculture Leasing Project - The project is proceeding on schedule. The DGEIS on the project will be presented to ALPAC early in 2008, and the SEQR process will be initiated thereafter in conjunction with the Suffolk County Council on Environmental Quality. The recommended shellfish aquaculture lease program will be described in detail, including all final maps, standards, criteria and local law provisions, in the project final report, which is expected to be completed by the end of the summer. Program recommendations will then be sent to the County Executive Office for policy review and action.

Comprehensive Water Resources Management Plan - Department of Planning will develop qualitative land use and population trend descriptions for the contributing areas of 30 public water supply wells with a history of impacted water quality. Serving as input to groundwater models, the Dept. will supply acreage data and GIS maps for land available for development (limited to only vacant and agricultural property with development rights intact) based on town and groundwater management zones. A compilation of current (2000) and future (saturation) population data showing year-round and seasonal population totals by town and groundwater management zone will also serve as input to groundwater models.

Fire Island to Montauk Point Reformulation

Study - The Corps of Engineers has expressed a new sense of urgency to bring the FIMP Study to closure, but target dates for completion of milestones, e.g., release of the project Draft EIS and decision documents for agency review, remain elusive, due to the need for various federal and New York State agencies to officially agree on the best mix of alternatives to follow. The staff will continue to attend FIMP IRG meetings as they are scheduled, and provide technical reviews of forthcoming project documents released by the Corps during 2008.



An Existing Land Use map prepared for Brookhaven Town, one of the five western Suffolk County towns that is part of the *Comprehensive Water Resources Management Plan*

Mud Creek Habitat Restoration Project - Department staff will seek and coordinate continued involvement of the Corps of Engineers in the design and feasibility analyses required for the Mud Creek ACE Section 206 Aquatic Habitat Restoration Project. Active participation by the Corps will depend on federal budget allocations. Based on the findings and recommendations of the Phase I ESA, it is anticipated that the Department will subsequently order a Phase II ESA for the subject parcels in early 2008. The Phase II ESA contractor will perform site investigations and soils testing at locations where there was a potential for soils contamination due to past duck farm operations, including such areas as settling pits and lagoons, swim ponds, feed lots and sanitary cesspool structures. Department of Planning action in 2008 may also include preparation of a RFP for components of the feasibility study and investigation of the possibility of using County personnel and heavy equipment to initiate removal of deteriorated buildings and associated debris.

Robinson Duck Farm County Park Habitat Restoration Feasibility Study – The Department of Planning will proceed with the implementation of this capital project in 2008. The RFP process will continue. Upon approval from the Department of Law, the RFP will be sent to Purchasing for advertisement. The Department of Planning in conjunction with an evaluation committee, will review proposals submitted and select a consultant. A one year contract for the conduct of the study will then be executed and work shall commence.

Characterization of Historic Duck Farm Activity and Restoration Priorities Report - The Department of Planning staff will conduct a technical review of the draft *Characterization of Historic Duck Farm Activity and Restoration Priorities* report when it is received from the Corps of Engineers.

Yaphank County Center Revitalization - A significant goal will be to complete the RFP process for the Yaphank County Center project and select a developer. Further steps will be the selection of a developer and the start of the project approval process.

Planning Commission Guidelines - The department has been working with the Planning Commission to update the guidelines that establish the policies and procedures of the Commission. The guidelines have not been updated in many years and need to be modernized and streamlined.

Continuation of modernization of the County Agricultural Districts Program

Completion of guidelines for the development of greenhouses on County-owned (PDR) farmland.

Acquire and train new staff to meet the growing needs of the department and to allow for succession as senior staff retires.

Continue the operation of the department as a high quality, professional agency with the high ethical standards and service to the residents of Suffolk County.

Suffolk County Department of Planning as of December 31, 2007

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Theodore Klein
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James Bagg
Christine DeSalvo

PLANNING AND RESEARCH

Roy Fedelem
Carol E. Walsh
Peter Lambert

CARTOGRAPHY AND GIS

Carl Lind
Kate Oheim
Thomas Frisenda
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LONG ISLAND REGIONAL PLANNING BOARD

Seth Forman, Ph.D., AICP

Cover photos - clockwise from top left representing Agricultural District administration, the Sunrise Highway Growth Center Study, the Characterization of Historic Duck Farm Activity and Restoration Priorities, and the Suffolk County Aquaculture Leasing Program.



STEVE LEVY
SUFFOLK COUNTY EXECUTIVE